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“Well-Being” before “Welfare society”: historical realities and language

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Abstract

The notions of “well-being”, on both a personal and social level, as well as that of a “welfare society” are the subject of important deliberation as part of the same economic theory. Even if their definition is tied to specific meanings in the context of more recent economic and social changes, their roots are not foreign to the historical situations that have left strong signs of identity. This paper is divided into two parts: the first, epistemological and the second, with case studies. In the context of an interdisciplinary approach, in fact, it is essential to explain the specificities of the historical and cultural research that is not limited to a mere cataloguing of past situations, but offers the possibility of inferring specific cognitive and pragmatic aspects. The case studies refer to aspects of the “common good” in communal Italy, to the origins of economic thought and the “charitable revolution” tied to late medieval charities. The latter were public enterprises that played a role as social and economic facilitators through the organization and management of large landed properties, the circulation of foodstuffs, the supply of services, the construction of a significant communication activity, with a catalytic role for the diverse forms of solidarity.

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1. Introduction

The notions of well-being and of a welfare society represent issues of particular importance in the economic theory itself; they document the need for a thoughtfulness capable of interpreting more factors for the constant changes that characterize our age. The transformations do not merely concern the dramatic changes experienced in recent times in all fields of civil life (politics, economy, society), but also the interpretative paradigms themselves that were compromised by those historical events that profoundly marked the last century, including lifestyles. To those paradigms also belong that very division between ethics and economics that, in truth, established a pragmatic and conceptual contrast between a moral and an economic ethics, brought up again today through the unresolved problematic issues concerning relations with the environment, natural resource management and protection, complex integration and development processes, and the relationship between science and technology, or between economics and politics (Sen 1987, 2000).

Faced with the shifting phenomena of global scenarios, there is a perceived urgency to recapture the bonds that connect human action, to address the consequences involving broader international and intergenerational contexts. If well-being has been measured in terms of wealth (affluence or profit), especially from the point of view of societies aspiring to free themselves from broad-scale poverty, there is more awareness today of the need to integrate the material and immaterial aspects affecting the individual and the social and relational levels (Casini 2000). It is a need that has also been exacerbated in the face of new multicultural contexts, requiring passkeys that can go beyond the logic of conflict or cultural crystallization, for a possible comparison and a peaceful civil coexistence.

The term *sustainability*, constructed on the adjectival form *sustainable*[†], has moved from the scientific and institutional lexicon to a more every-day one, in order to interpret a range of aspects in various contexts, stretching from the environment to economics and also agricultural practices (Santini et al. 2013). The famous Brundtland report, *Our Common Future* (1987), defined it as «development which meets the needs of the present without compromising the ability of future generations to meet their own needs». Still, the meaning it conveys is not new on either a historical or a cultural level.

Thus, a retrospective look can take on a certain value, not so much by summoning past realities as by recapturing those values of civil life that transcend historical contingencies. In order to set the conditions for a true interdisciplinary contribution, I feel obliged to mention some specific aspects of historical knowledge and then devote attention to case studies that contribute to the discussion of an issue like that of the link between *ethics* and the *sustainability of well-being*.

2. Historical knowledge and research questions

An interdisciplinary approach does not consist merely of an exchange of data, information, or specific finds, nor is it a combination of disciplinary languages. Each datum acquires its proper meaning in relation to a reference context that can be either the factual reality or the specific theoretical formulation.

Climate history, for example, combines the climatological and historical survey with a common study subject. While climatologists seek to understand climatic variability so as to develop models for interpreting and forecasting the climate, economic historians are interested in various models for understanding and evaluating the relationships between climate change and economics. In short historical knowledge differs basically from these research perspectives. For the historian, even a single event has meaning, though it cannot be generalized since, through it, material and immaterial aspects can clearly emerge that connote the experience of history on an individual and

[†] In Romance languages, the adjective "*sostenibile*" comes from the verb meaning "to support", *sostenere* (Fr. *soutenir*, Sp. *sostener*, Catalan *sostenir*, Port. *soster*), which is from the Latin *sustinere* (prop up, support, bear, shoulder, hold up). The spread of the English term "sustainable" (derived from the French) in (EU) scientific and institutional language nevertheless presents some problems in translation. In English, the term has assumed different meanings and uses in different contexts (able to be maintained, conserved; upheld, defended), and, in some cases, may be considered very close to the term "reasonable". Such semantic plurality is lost in a simple translation (It. *sostenibile*; Sp. *sostenible*). In French and German, it is translated differently in different contexts: *durable* or *raisonnée* (*agriculture*) in French; *nachhaltig*, *dauerhaft*, *verträglich* in German.

social level. The history of ideas is insufficient for the historian interested in reconstructing how and what men did to become wealthy within a specific social context, the motivations that spurred their actions (the whys) and how these were communicated, and even a consideration of the different perceptions of wealth and poverty. Historical knowledge, moreover, is not satisfied with the appearance of being true, requiring, to the extent possible, a reliable reconstruction based on case studies. Even if attentive to the quantitative and structural dimensions, those questions that concern the lives of people and communities cannot be avoided, as history does not pass above people's heads but rather among those who lived and are living it. When historical perspective deals with the elaboration of ideas, it is mainly interested in their movement, the forms of reasoning, and the forward-thinking deriving from them.

Historical knowledge, moreover, always starts from research questions that are set out vis-à-vis the objects of study. If those questions connote the present, it is also true that the validity of the interpretative theories arising from those questions is shown by their ability to better explain historical realities, taking several factors into account and making them more intelligible. Coming to our topic, if the terms “sustainability” or “well-being” today express the need to expand the framework for confronting our times and those of future generations, they are offered at the same time as keys for reopening historical issues. As confirmation of these new demands, I would like to point out that it is not by chance that, recently, medieval studies have also proposed new historical approaches, paying attention to the themes of “well-being” and the “welfare society” at an important international convention with the revealing title of *The search for Individual and Social Welfare. Material and immaterial ingredients. 13th- and 14th-century Italian towns* (2011). Those who pursue historical knowledge know very well that new acquisitions come not only from new research, but also from submitting previously known subjects yet unexplored to new research questions or interpretative theories. This is one of the reasons why medieval studies are most receptive to these new stimuli, because of the peculiarity and diversity of that historical period, which actually represents the birth of a new civilization, from politics to economics, from culture to the arts, deeply connected to the classical era and Greek-Roman heritage.

Even if the Middle Ages is not an easy period to tackle, due to negative prejudices or equally skewed glorifications derived from modernity, what I would like to present briefly in these pages are some historical and cultural aspects that can help deduce meaningful data on a cognitive and pragmatic level through historical languages and realities. On the other hand, we must consider that medieval urbanization, economic development, and various aspects of cultural and civil life, especially in the specific situation of Italian cities, are at the base of the distinctive features of identity that have left an important mark on European history (Cherubini 2009; Franceschi, Taddei 2012). Republicanism's success in contemporary times has been related to the earlier republican era of medieval city-states (Viroli 2009).

3. The dimension of reasonableness in the political, economic and social life

From the very beginning, I stated that the refined formulation of the terms “ethics” and “sustainability of well-being” today lacks synthesis. The term “common good” in political and economic languages is often used to fill this gap even if the definition of what is meant by this “good” is very uncertain. Likewise, the term “economic rationality” has been equated with the concept of profit and its restraint-free maximization, yet suffering the distortions that historical reality experienced and continues to experience. Even such specific sectors as the *non-profit* or *third sector* do not easily find a proper place in theory and practice.

However, taking into consideration the origins of the medieval communal republics and of western economic development, we must note that such uncertainties and distortions can be dealt with. If the people of that time had had to translate the term “sustainability” into their way of thinking, they would probably have turned to the concept of reasonableness in all its cognitive and pragmatic dimensions and its specific contexts (Murray 2011).

I will just limit myself to some examples and case studies.

3.1 The bond of the “common good”

The fresco by Ambrogio Lorenzetti (1339) in the Siena town hall (Palazzo pubblico) contains the clearest and most concise representation of the “common good”. It was painted at the beginning of the final decade of the

government of the Nine (1287-1355) which, for its longevity and activity, was a model case among the Italian medieval communes. Following in our imagination the steps that brought the Nine (elected every two months) to the hall designated for them, the frescoes unfold before us like a book. To the left of the large window that looks out over the town's surrounding countryside, the wall shows the effects of the "good governance" in town and country. It was not a "utopian" world, but rather a possible reality where social differences (rich and poor people appear) and professional ones (the merchants, academics and artisans, unskilled labourers, peasants, etc.), were not eliminated but where the possibility of prosperity (or well-being/welfare) was assured by the *Securitas* that dominates the whole scene: «fearlessly every free man shall walk and, those who work (the fields) shall sow, as long as the Commune maintains the rule of this woman» (*Justice*). Depicted on the opposite wall are the effects of "bad government" in a city and countryside dominated here by "Dread" (*Timor*, fear) and the allegory of the "Tyrant". The observation of its possible effects turned attention to the wall above the ancient entrance door, with the allegory of "good governance". Here the *Commune* (C[ommune] S[enarum] C[ivitas] V[irginis]) is represented by a regal figure and the scroll illustrates how "Justice" brings the "many" to unity and the latter «gathered for this purpose, create as their Lord a Common Good» (Castelnuovo 1995: 385). It is worth paying attention to the thread that descends from "Justice" (dominated by "Knowledge") to "Concordia" and leads to the Commune (and to the *common good*), along the rope that the citizens hold in their hands. From the Greek root of the verb "tie" (*dèō*) derive both the meaning of bond (*dèsmos*) and of the verbal form "the need of" (*dèi*), from which "what is needed" (*tò déon*) is derived: the ontology that founds deontology is therefore the *bond* as the constituent element of a civil affiliation, freely grasped in the fresco by the "many".

On the whole, the page of communal Italy's history, recalled concisely in Siena's case, offers us a reflection on the relationship between a civil community's aspirations and needs and the possibility of satisfying them as well as the choices made to create that possibility: enterprises of public charity such as the hospital of Santa Maria della Scala (which we will discuss further on); the experimentation with new forms of fiscal administration (the *Tavola delle Possessioni*, the first descriptive cadaster); original forms of political communication through the writing of the collected regulations in the vernacular (the 1308-09 *Costituto*, so that, without «sophistry and caviling» it was accessible also to «the poor and others that do not know grammar»); new town planning and public buildings (including the new cathedral and the town hall); exceptional fresco cycles that, through the centuries, have launched concepts, messages and political principles «of harmony in a society that wanted to discover unity in the idea of the common good» (Piccinni 2014).

But those cycles of frescoes, like a government's decision to speak in the vernacular, bring us to explaining an important point: it was the rational commitment in its dual cognitive and pragmatic dimensions to founding the civil experience and construction of the "common good". So before our eyes is the liveliness of a cultural tradition that, extending from Aristotle to Thomas Aquinas, Bartholomew of Lucca, Giles of Rome, and Bartolo da Sassoferrato, became concrete historical events that, despite their contradictions and conflicts, have given our cultural identity an extremely valuable result. In any case, Bartolo da Sassoferrato in his *De Tyranno*, in which he drew on the ideas of Saint Thomas and Giles of Rome, was not unrealistic when stating that «as it is rare to find a totally healthy man who does not suffer from any minor complaints, it is just as rare to find a system of government that devotes itself only to the public good and where there are no tyrannical aspects. It would be more divine than human». However, he continued, «let us say that a good and non-tyrannical government is one where the common and public interest, rather than the ruler's, prevails». (*Questio*, XII; Quaglioni 1983; Zorzi 2010).

3.2 The justification of economic action and social utility

A second case study is built on the concept of economic action and its social utility. The origins of Western economic thought date back to the Patristic period in the early centuries of Christianity (Todeschini 2005): clearly, they were not treatises on economics, but rather writings that were part of the most profound religious and theological thought (from Basil of Caesarea and Clement of Alexandria to Ambrose and Augustine). They included a moral evaluation of economic activities, ownership, and use of goods. In the 12th and 13th centuries, there was a heated debate around usury that ran along the "thin, sometimes almost imperceptible" line between "personal profit" and "public good" (Todeschini 2005: 179). The Latin translations of Aristotle's works (*Nicomachean Ethics* and

Politics) and the emergence and spread of new business and credit practices, were at the center of Thomas Aquinas's codification of the concept of "just price" (Sapori 1982). In the 14th and 15th centuries, the Franciscan Observance in particular was the interpreter of a more articulate justification of economic action and its public function up to Bernardine of Siena's final formulation (Todeschini 2004).

Shifting the focus from the plane of historical economic thought to a practical one, I would refer to some brief research notes regarding one of the leading exponents in the medieval mercantile world, Francesco di Marco Datini. He built an important business empire at the end of the 14th century (a holding company, with premises in Florence, Prato, Pisa, Genoa, Barcelona, Valencia, and Majorca; agents in Milan and Venice; and a trade network that incorporated all of Europe and the Mediterranean basin), which has been studied extensively due to the preservation of the Prato merchant's exceptional archives (Melis 1962; Nigro 2010). Through the merchant's correspondence with his partners, used as a form of intra-company and interpersonal communication, it has been possible to reconstruct not only of economic specific aspects, but also the mentality of the time (Nanni 2010).

In short, the language and concepts expressed by the merchant are surprising for their liveliness. This skillful businessman that ran a system of companies so well-structured for the time, did not conceive business just in terms of profit. He clearly stated that the very creation of companies had a social impact, and he wished "do some good" with the wealth produced by his commercial and financial activities. The recurring term he used in assessing economic activities and justice, morality and his aspirations and projects was reasonableness: live "according to reason, i.e., according to nature", or reasonably, and not "according to desire", or willfully (Nanni 2010). The idea of living "according to reason" thus does not come to our attention through the treatises or literary works of important authors, but arises in the communication of a 14th-century merchant with his partners, sure indication of a widespread mentality and culture.

It is that sense of the social utility of wealth that took shape in his final venture. Without issue, he pledged his palace and fortune to the establishment of a secular charity in his birthplace of Prato. The «*Cepo pe' poveri di Cristo*» was to invest his riches in landed properties that would produce food for distribution to the poor and manage the lands to ensure the institution's continuity. Thus, landed properties, agricultural production, and redistribution represented the foundations of a public enterprise entrusted to Prato's communal government, leaving Datini's indelible mark on his place of birth.

Enterprise and planning, social responsibility and public utility were thus not separate realities, for a mindset in which the religious dimension was not merely a private action.

3.3 The "charity revolution": public enterprises and welfare society

Continuing in this direction, it is worth recalling Michel Mollat's succinct definition (1982) of the "charity revolution" as the articulated organization and spread of medieval hospitals, as an answer to poverty and to the various needs (the elderly, widows, orphans, the sick, etc.). In effect, the depiction of charity, crowning Ambrogio Lorenzetti's "Good Governance", among the other theological virtues (faith and hope) was not just an ideal reference, but rather had brought to Siena itself the most complex hospital project of the Middle Ages. Hence, it was not just *virtus*, but also *habitus*, and so charity became a public action, thus creating a sort of welfare society (Piccinni 2012) or such *non-profit* organizations as the confraternities that involved the entire medieval world (Bianchi 2009; Gazzini 2013; Bressan 1982).

In particular, the case study carried out on Santa Maria della Scala in Siena has highlighted not only the forms of assistance and its role as a hospital in the city's life (politics, economy, society), but also the creation of a new business, the «*banco*», a kind of forerunner of the savings and deposits bank, as well as its role in supplying the town with the food produced on its large landed property (Piccinni 2012, 2014; Epstein 1986). In general, the construction of public charity enterprises of this type can be considered «the most successful among the various forms of public social protection tried» in the Middle Ages, and part of the «urban culture of solidarity» itself (Piccinni 2013).

While Siena followed the large hospital model, Florence stood out for its charitable specialization: in particular, Santa Maria Nuova, San Matteo, San Bonifazio, and the Spedale degli Innocenti, to mention just the main ones (Grieco Sandri 1997). Likewise, every Tuscan town had a large or small hospital (Lucca, Pisa, Arezzo, Pistoia etc.),

including the smaller centers like Prato that, in the 15th century, had the highest proportion of charitable institutions (and services available) in relation to its population (Nanni 2014).

If the charitable institutions were true public enterprises, their role as social and economic facilitators can also be highlighted. Indeed, in a certain sense, they served as the link between redistributing the riches deriving from donations (Pastore Garbellotti 2001) and rationalizing the landed property, between farms and working capital for peasant families, and between food production (bread, corn, wine) and its availability to the poor through selling, credit, or charity. Through these structures, with town governments' special formulas halfway between the public and the private, whole communities devised the various answers to the society's different levels of need: from assistance to public works investments, from the redistribution of wealth to forms of credit and savings.

4 Conclusion

The case studies examined illustrate past realities and conceptions that offer the possibility of reclaiming cultural and identity elements. Although commonly used, terms such as "common good", "enterprise" and "social utility", "ethics", and "sustainability" are not always shared with critical awareness, and their meanings are often vague. Historical perspective and case studies have an important function, also for the theoretical development as they allow inferring specific aspects on the cognitive and pragmatic levels, beginning with a commitment to reasonableness in the reconstruction and correctness of the language and the task of a proper communication to ever new generations. From a semiotic perspective, in fact, «the historical process can be presented as a communicative process» in which new information (or historical reconstructions) «brings about response reactions on the part of the social recipient» (Uspenskij 1988), or of any of the various stakeholders.

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